Top 23 Research leaders up 18%

Revenues of the U.S. marketing/advertising research industry grew 18% in 1979 over 1978. Since inflation was 13% in '79, this suggests a "real growth" rate of 5% compared to 12% in both 1977 and 1978.

This fifth annual compilation is based on the individual records of 23 leading for-profit organizations known to have had research revenues of $5,000,000 or more in calendar 1979. All are U.S.-owned, and their main function is the development of marketing and/or advertising research. (The total revenues of each, including nonresearch activities, are noted in the individual profiles that follow.)

research beat

BY JACK HONOMICHL

Industry growth, however, looks much different if based on the records of those 22 organizations other than A. C. Nielsen Co. Nielsen alone, as the table shows, had '79 research revenues of $302,100,000, or 42% of the 23-company total of $719,500,000. Nielsen's volume, in fact, is more than that of the next eight largest organizations combined.

Nielsen in 1979 had a growth rate of 22%, thanks in part to a built-in price escalation clause, based on government inflation rates, in many syndicated service contracts. Also, since much of Nielsen's research revenue comes from outside the U.S., revenues expressed in U.S. dollars were influenced by changing currency exchange rates.

The remaining 22 organizations had a combined growth rate of only 15% in '79—a bit ahead of the 13% inflation rate. In fact, only eight of the 22 organizations other than Nielsen had a 1979 growth rate in excess of 13%, and three are believed to have had a revenue decline.

▪ As the table shows, nine of the 23 research organizations showed significant revenues coming from operations outside the U.S. In total, these foreign revenues were about $205,900,000, or 29% of the total. Since the 23 alone account for about $720,000,000 in research revenues, it suggests a total industry size well exceeding $1 billion. To pin that total down, information would be needed on (1) approximately 350 other for-profit research organizations which are smaller than these 23, (2) nonprofit research organizations, (3) research conducted in-house by large manufacturers such as General Mills and General Foods, (4) research conducted directly by U.S. advertising agencies and (5) research conducted directly by agencies of the U.S. Government, and especially the

(Continued on Page 90)

How they rank in size

1979 Revenues:
Top U.S.-owned research companies

Rank	Organization	Research Revenues (in millions)	% Change vs. 1978	Revenues from Outside U.S. (millions)
1	A. C. Nielsen Co.	$302.1	+22	$126.9
2	IMS International	88.8	+18	60.4
3	SAMI	54.4	+13	—
4	The Arbitron Co.	44.1	+25	—
5	Burke Int'l Rsch.	42.6	+15	12.4
6	Market Facts	19.3	− 7	1.0
7	Westat Inc.	14.4	+50	—
8	Audits & Surveys	14.0	+ 8	—
9	Marketing & Rsch. Counselors	13.1	+13	—
10	ASI Market Rsch.	12.3	− 6	1.2
11	Chilton Research	12.0	+93	—
12	Yankelovich, Skelly & White	11.8	+26	.1
13	Ehrhart-Babic Assoc.	10.4	+13	.2
14	National Family Opinion	10.0	—	—
15	NPD Research	9.7	+16	—
16	Data Development Corp.	9.6	+13	—
17	Louis Harris & Associates	9.3	+ 3	2.8
18	National Analysts	8.7	+ 9	—
19	Opinion Research Corp.	8.2	+ 7	—
20	Elrick & Lavidge	7.1	+ 5	—
21	Walker Research	7.0	+ 1	—
22	Starch INRA Hooper	5.5	+24	.9
23	Decisions Center	5.1	+ 9	—
	Total	$719.5	+18% (av.)	$205.9

Note: These are research revenues only. Total revenues of each are noted in individual company profiles.

Charting Charter's growth

Eller's 2nd time around

By BERNICE KANNER

NEW YORK—Though Karl Eller has a reputation as a swashbuckling wheeler-dealer, Mr. Eller considers himself to be, above all else, an ad salesman

These sales skills plus tender loving care are the tools this modest, even shy, 52-year-old native Chicagoan plans to trade on as he begins fashioning a broad-based media empire from the economically lackluster foundation of Charter Media Co.

For Mr. Eller, CMC holds the promise of rebirth. This communications magnate—who began as an outdoor salesman in Tucson—by uncanny purchasing decisions and unparalleled financial finesse parlayed a shoestring operation into a multi-million-dollar public company, Combined Communications.

Within a decade of his outdoor board sales days, Mr. Eller had put together a group to buy two of the company's outdoor subsidiaries—and then borrowed enough to buy out his backers. After that he started racking up bank loans and snapping up radio and tv stations (beginning with Phoenix where his headquarters remain), newspapers, including the *Oakland Tribune*, and a raft of other outdoor companies. At the time of the purchases, the investment community shook its head and tsked about the steep prices; no one tsked later.

Mr. Eller's largest purchase—and some (but not Mr. Eller) say the one that did him in at Combined—was the *Cincinnati Enquirer*. To add the daily to Combined's properties, he had to trade away a significant portion of the company to *Enquirer* owner Carl Lindner. Reportedly, he and other outside investors collectively pressured Mr. Eller to sell Combined for a windfall. Mr. Eller

(Continued on Page 125)

"I just couldn't stay away from the media business"
—Karl Eller

Free tv and ABC will prevail, affiliates told

By COLBY COATES

LOS ANGELES—Although ABC-TV Network affiliates heard Leonard Goldenson, chairman of the board, ABC Inc., promise that free, over-the-air tv will "prevail" over "new technological competitors," they still reserved their loudest cheers for a dramatic appearance by the members of the U.S. Olympic gold medal-winning hockey team.

Emotions aside, however, Mr. Goldenson's reference to new technology as "aggressive competitors with nothing to lose and everything to gain out of ou. hides" was something the affiliates will remember long after they forget that Jim Craig was the hockey team's goalie or Mike Eurizone, the captain.

ABC's commitment to "free advertiser-supported tv" was also on exec vp Fred Pierce's mind. He told affiliates that despite rising programing costs and economic uncertainties, ABC management understands that to be competitive requires loosening the purse strings.

The ABC-TV boss gave another strong vote of confidence to Entertainment boss Tony Thomopoulos, but made no attempt at "glossing over our disappointment" about the results of the just concluded season. In addition, in what some interpreted as "sort of a comment" on the firing of John Backe as CBS president, Mr. Pierce stressed "the stable management of ABC," where "leadership depends on the quality of people, not only the quality of the programs."

▪ In looking to the 1980-81 season, Mr. Pierce promised affiliates, "We will prevail next fall in what promises to be the toughest season ever."

Network president James Duffy, in the opening address to the 207 ABC affiliates, picked up on what's become the network's rallying cry, No. 1 from sign-on to sign-off. He said ABC will continue as the full-day leader because of the "strength we have across the board in every category of programing."

Squire Rushnell, vp-early morning and children's programing, announced another first for "Good Morning America"—it surpassed NBC's "Today" as the leader in delivering the young male audience. "GMA" already has the women locked up, earning the biggest ratings among women 18-to-49 years for the last seven consecutive quarters.

As part of the network's effort to insure that the sign-on strength of "GMA" continues, Mr. Rushnell revealed that "French Chef" Julia Child and newsman Hughes Rudd are joining the program as regular contributors. He also said a permanent replacement for Sandy Hill, now a "GMA" special correspondent and ABC Sports personality, would be named by August.

Continuing the "across the board" concept, ABC Entertainment vp Seymour Amlen told affiliates that for the first four months of 1980, ABC daytime fare delivered 3,760,000 women, 18-49 years, per average minute, compared to CBS, which reaches 2,360,000, and NBC with 1,890,000. In addition to

(Continued on Page 129)

Top 23 Research leaders up 18%

(Continued from Page 3)
Demographic Survey Division of the U.S. Bureau of the Census, which alone does from $60,000,000 to $70,000,000 in survey research each year.

Based on the 23 organizations in this year's listing, the U.S. research industry is controlled by public corporations. Of the total revenues of $719,500,000, 58% is accounted for by stand-alone public corporations, and another 20% is accounted for by subsidiaries or divisions of larger public corporations. About 3% is attributable to organizations which are part of a larger, privately held corporation, and only 19% is accounted for by stand-alone privately held corporations. The image of a cottage industry populated by small mom-and-pop operations is a myth.

There was significant change in this year's listing due to mergers and acquisitions. The most newsworthy was the sale of three research operations—AdTel, Market Audits and BASES—by Booz, Allen & Hamilton to Burke International Research Corp. This dropped Booz Allen out of its 7th place in last year's listing. However, another Booz Allen-owned research organization, National Analysts, continues on this year's listing.

Also in 1979, Equifax Inc., a public corporation based in Atlanta, acquired Elrick & Lavidge, a Chicago-based survey research company. A research subsidiary of Equifax, Marketing Information Service, was then merged into E&L, resulting in a combined operation with revenues exceeding $7,000,000 and a 20th place listing in this compilation.

Market Facts, another Chicago-based company, No. 6 on this year's listing, recently rebuffed an acquisition offer by Automated Marketing Systems, a Chicago-based communications service company.

The average age of presidents of the 23 organizations in this year's listing was 49, same as last year.

There follows a brief profile on each of this year's 23 leading U.S. research companies, along with their plans for expansion in 1980.

No. 1. A. C. Nielsen Co., Northbrook, Ill. Public corporation traded o-t-c; founded in 1923. Research revenues: $302,100,000, up 22% over '78.

Gross revenues of Nielsen for the 12 months ending Nov. 30, 1979, were $420,500,000, and, based on data from its fiscal year ending July 3, 1979, 71.8% of that, or $302,100,000, was attributable to the two Nielsen research divisions—86% from the marketing research group and 14% from the media research group. (Note: The revenues of two subsidiaries—Compumark and Coordinated Management Systems—which are not strictly engaged in marketing research are included by Nielsen in marketing research group revenues.) About 58% of Nielsen research volume is in the U.S.; the balance comes from 22 foreign countries through subsidiaries.

In addition to the traditional custom and syndicated store audit and tv audience measurement services, Nielsen has a Store Observation Service (reporting on on-shelf conditions) and two new facilities—one in Rochester, N.Y., another in Seattle—which utilize data from UPC scanner-equipped stores. In Rochester, there is a consumer panel which links specific store purchases to individual households. Overseas, during 1979, Nielsen expanded its Household Appliance Index service to four new countries and its Photo Index service to four more.

In the U.S., starting this summer, Nielsen plans to launch a national product movement service based on a sample of all of the approximately 1,200 UPC scanner-equipped supermarkets.

It is estimated that about 12,300 Nielsen employes are engaged in research activities.

President is N. Eugene Harden, 45, a graduate of Lawrence University. Chairman and chief executive officer is Arthur C. Nielsen, Jr., son of the founder.

No. 2. IMS International, New York. Public corporation traded o-t-c; founded in 1954. Research revenues: $88,800,000, up 18% over '78. Gross worldwide revenues were $141,800,000, of which $88,800,000 came from market research activities through wholly owned subsidiaries in 51 countries. IMS America, the U.S. subsidiary, had research revenues of about $28,400,000.

IMS is to the world's pharmaceutical/medical industry what the A.C. Nielsen Co. is to the packaged goods industry. Research services include (a) retail outlet measures of ethical pharmaceutical sales; (2) panels of doctors reporting on diagnosis and treatment of patients; (3) customized audits of purchases by, for instance, hospitals and laboratories, and (4) custom studies, including surveys. The U.S. company also has an audit service of alcoholic beverage warehouse withdrawals in New York and Chicago; this will be expanded to California this year. Also, during 1979 the company developed an on-line data access system for clients.

There are about 2,150 IMS employes engaged in its research activities. President and ceo of IMS is David Dubow, 61, who resides in London. He is a graduate of the Columbia University Graduate School of Business. President of IMS America is Frank Osgood Jr.

No. 3. SAMI, New York. Wholly owned subsidiary of Time Inc.; founded in 1966.Research revenues: $54,400,000, up 13% over '78.

The basic activity of SAMI is to amalgamate warehouse withdrawal data to produce continuous movement data for thousands of individual brand items in each of 39 U.S. market areas. There are about 450 corporate clients for this service.

A new service, SIFT, for the institutional food market, was expanded from four to ten markets in 1979. Another new service, Scanner Store Data Service, which captures continuous store movement data from UPC scanner-equipped stores, was started in Kansas City during 1979; Portland, Me., is now being opened. Further, in Kansas City, SAMI started the Electronic Consumer Panel, which links specific store purchases to individual households. Early in '79, SAMI announced the intention of starting its basic service in Canada; this has not materialized to date.

SAMI has 400 fulltime salaried employes located in three offices.

President of SAMI is John A. Watters, 54, who is a graduate of the Columbia University Law School.

No. 4. Arbitron Co., New York. Wholly owned subsidiary of Control Data Corp.; founded in 1949. Research revenues: $44,100,000, up 25% over '78.

Arbitron had gross revenues of $47,900,000, of which 92% was attributable to research services.

The main business of Arbitron is measurement of television viewing and radio listening audiences at the local market level. Most of these data are collected via diaries placed in-home (supplemented by telephone interviewing), and about 2,000,000 households are contacted each year.

New in 1979 are services for local and national cable-wired households and a special survey, conducted in tandem with Video Probe Index, which will gather information on cable, pay cable, videocassette, videodisc, electronic games, subscription tv, and other electronic developments impacting viewer habits. In its basic radio services, Arbitron instigated during 1979 quarterly measurements (available in 22 markets in spring, 1980). Four markets—New York, Los Angeles, Chicago and San Diego—will be measured 48 weeks out of the year in '80. In addition, Arbitron has started Qualidata, which gives advertisers qualitative audience measures. A county coverage study, started in 1978, will again offer audience information on every county in the U.S.

There are about 600 fulltime employes at Arbitron engaged in research activities.

President of Arbitron is Theodore F. Shaker, 58, who is also a vp of the parent company. He has attended Colgate, Northwestern, and New York Universities.

No. 5. Burke International Research Corp., Cincinnati. Privately held corporation; founded in 1947. Research revenues: $42,600,000, up 15% over '78.

In August of '79 Burke bought four research operations from the Chicago-based consulting company of Booz, Allen & Hamilton: AdTel, Market Audits, BASES and the telephone research center in Cincinnati, which was later closed down.

The revenues cited above are annualized for all of 1979 and include the four Booz Allen properties plus the parent Burke volume, domestic and international. The growth rate was calculated against the same base for 1978.

In April of this year, Burke's principal owner, Donald L. Miller, announced that, according to a letter of intent, ownership would pass to a group of Burke employes in mid-year, and the new ownership had plans to sell off five Burke International subsidiaries in western Europe. Burke also has been divesting its interest in international subsidiaries in South America. However, the numbers above reflect, basically, the Burke situation as it existed during most of 1979.

The domestic operation, Burke Marketing Research, said it spent well over $1,000,000 in 1979 to produce market-by-market measures of radio listening audiences in competition with Arbitron; this service was abandoned in mid-year due to lack of industry support.

The basic business of BMR continues to be custom survey research in the areas of marketing and advertising, and especially day-after recall of tv commercials on-air, all of which is done by telephone surveys. All together, the Burke units had 250 fulltime salaried employes on average during 1979.

President of BIRC since mid-'79 has been Jack E. Brown, 35; he attended the University of Cincinnati. Previously, he was with Booz, Allen & Hamilton.

No. 6. Market Facts, Chicago. Public corporation traded o-t-c; founded 1946. Research revenues: $19,300,000, down 7% from '78.

These revenues include a wholly owned subsidiary, Market Facts-New York, but do not include Market Facts of Canada, in which the parent owns half interest. If Canada were added, total Market Facts revenues would be about $22,000,000.

MF activities include (a) field surveys, (2) Marketest store audit system, (3) national telephone center (CRT interviewing via WATS), (4) consumer mail panel (increased to 100,000 households in '79), and (5) Consumer Opinion Forum (three mail facilities).

MF has 556 fulltime salaried employes in seven offices (a client service office was opened in Dallas during '79).

In March, 1980, MF rejected a purchase offer of approximately $4,600,000 made by Automated Marketing Systems, Chicago.

President and ceo of MF is Jack Abrams, 49, who has an M.B.A. degree from Northwestern University.

No. 7. Westat Inc., Rockville, Md. Employe-owned corporation founded in 1961. Research revenues: $14,400,000, up 50% over '78.

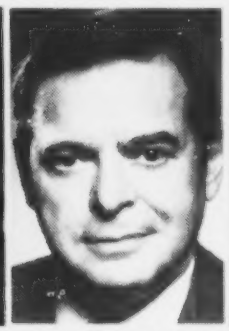
Most of Westat revenues come from survey research studies conducted via personal interview, tele-

(Continued on Page 92)

N.E. Harden
A.C. Nielsen Co.

David Dubow
IMS Int'l.

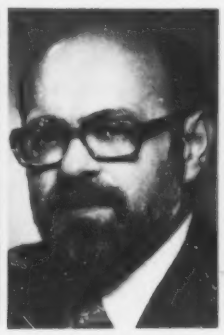
John Watters
SAMI


Theodore Shaker
Arbitron Co.

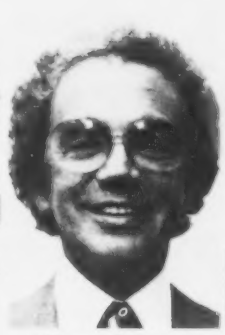
Jack E. Brown
Burke Int'l. Rsch

Jack Abrams
Market Facts

Joseph Hunt
Westat


R. L. Lysaker
Audits & Surveys

Cecil Phillips
Marketing & Rsch.


Pierre Marquis
ASI

D. J. Kilpatrick
Chilton Research

D. Yankelovich
Yankelovich, Skelly

Top 23

(Continued from Page 90)

phone or mail for civilian agencies of the U.S. Government.

The company employs about 170 salaried professionals, as well as a telephone interviewing, support and survey processing staff (averaging about 250 employes), and a national field force (averaging about 150 employes).

During 1979, Westat developed samples and staff resources for studies of business establishments and added a focus group and organizational behavior staff.

President and ceo of Westat is Joseph A. Hunt, 44, who holds an M.S. degree from Massachusetts Institute of Technology. Edward C. Bryant, founder of Westat, continues as chairman.

No. 8. Audits & Surveys, New York. Privately held corporation; founded in 1952. Research revenues: Estimated at $14,000,000, up about 8% over '78.

This estimate for the parent includes the survey division, Test Audit division, National Total-Market Audit division, and CRT telephone interviewing facility, which in total have over 200 fulltime employes. It is not meant to include other organizations in which A&S or its principals have a position: A&S Latinoamerica, Total-Market Index in Canada, Market Probe International, a service bureau that also has survey research business, and Integrated Computer Systems, a service bureau.

During 1979, A&S discontinued TRAC-7, an attempt to enter the local-market radio audience measurement business.

President of A&S is Richard L. Lysaker, 47, who is a graduate of the University of Minnesota. Solomon Dutka, founder of A&S, is chairman.

No. 9. Marketing & Research Counselors, Dallas. Partially owned subsidiary (founded in 1965) of Tracy-Locke Co. Research revenues: $13,100,000, up 13% over '78.

M/A/R/C, a full-service, custom research house, utilizes a telephone survey WATS facility with 200 positions, 15 mall locations and five computers. There are 136 staff professionals, 216 hourly staff professionals and 1,500 hourly employes.

During 1979, M/A/R/C added offices in Boston and Sacramento, bringing the total to 12. Other new developments included the addition of a statistical services department and the completion of a CRT on-line interviewing and topline tabulation system.

President of M/A/R/C is Cecil B. (Bud) Phillips, 55, who is a graduate of Southern Methodist University.

No. 10. ASI Market Research, Los Angeles. Privately held corporation founded in 1962. Research revenues: $12,300,000, down 6% from '78.

Gross revenues in '79 were $14,800,000, 83% of which were attributable to research activities. About 90% of research revenues were domestic, with the balance coming from subsidiaries in Tokyo, Hong Kong, Seoul and Frankfurt.

ASI, originally founded as Audience Studies Inc., specializes in controlled audience pretesting of tv commercials, pilot films and phonograph records. In addition, the company does on-air testing of tv and radio commercials, print advertising pretesting, surveys and focus group interviews.

During 1979, ASI divested its operations in Tokyo, Seoul and Frankfurt—although it still maintains ties with those organizations—and this impacted revenue levels.

L. J. Babic Jr.
Ehrhart-Babic

Jack Trumbull
Natl. Family Opinion

Tod Johnson
NPD Research

J. Goldstein
J. Rosenkranz
Data Development Corp.

Louis Harris
Harris & Assoc.

Alfred Goldman
National Analysis

Herbert Marsch
Opinion Research

Robert Lavidge
Elrick & Lavidge

There are 310 fulltime salaried employes and about 740 parttimers.

Chairman and ceo of ASI is Pierre Marquis, 53, who is a graduate of Boston University School of Law. President is Gerald Lukeman.

No. 11. Chilton Research Services, Radnor, Pa. Wholly owned subsidiary of American Broadcasting Cos.; founded in 1957. Research revenues: $12,000,000, up 93% over '78.

Ownership of this survey research organization changed in May, 1979, when ABC acquired the parent, Chilton Co.

CRS basically consists of a large-scale CRT/WATS interviewing system and personal, face-to-face interviewing (about 40% of total volume). There are two syndicated services: AGTRACK, a monthly survey of farmers, and (2) ADCHART, a longitudinal ad measurement program.

During 1979, Chilton opened a new 50-station telephone interviewing facility in Arlington Heights, Ill., and two new offices in Philadelphia related to personal interviewing. All told, the company has 170 fulltime employes, 700 parttimers.

Since April, 1979, the general manager of CRS has been Dean J. Kilpatrick, 35, who has an M.B.A. from the University of Delaware. He is also a vp of Chilton Co.

No. 12. Yankelovich, Skelly & White, New York. Wholly owned subsidiary of Reliance Group; founded in 1958. Research revenues: $11,800,000, up 26% over '78.

This survey research company, acquired by Reliance in 1969, does marketing and social research for industry, media and government. Standardized services include: (1) Laboratory Test Market, a simulation facility; (2) Monitor, tracking surveys of special social segments; (3) Corporate Priorities, tracking surveys on public policy issues; and (4) Market Alert, tracking surveys re consumerism pressures.

There are 206 fulltime YSW employes located in seven offices, one of which is in London. About 1% of the company's business is done outside the U.S.

Founder and president of YS&W is Daniel Yankelovich, 53; he is a

(Continued on Page 94)

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(Continued from Page 92)
graduate of Harvard University.

No. 13. Ehrhart-Babic Associates, Englewood Cliffs, N.J. Privately held corporation founded in 1958. Research revenues: $10,400,000, up 13% over '78.

These revenues do not include an E-B service bureau subsidiary, E-B Data Services, but they do include those of National Retail Tracking Index, a wholly owned subsidiary.

E-B specializes in custom store audits, controlled mini-market store tests and syndicated distribution studies in a variety of retail outlets. During 1979, the company expanded its NRTI service to Canada. A new service planned for later in 1980 will take Ehrhart-Babic into scanner checkout data systems.

There are 136 fulltime employes and about 2% of revenue comes from outside the U.S.

President of E-B and one of the founders is Louis J. Babic Jr., 47, a graduate of Boston University. The other founder, Thomas A. Ehrhart, is chairman.

No. 14. National Family Opinion, Toledo. Privately held corporation; founded 1946. Research revenues: Estimated at $10,000,000, about the same as '78.

NFO does not cooperate with this industry roundup, but best estimates are that 1979 revenue showed no growth and perhaps declined a bit in 1979.

Main NFO activities are a standing mail panel of about 150,000 households and telephone interviewing via a WATS facility with about 100 stations, much of which is housed in a new facility in Greensboro, N.C. Other activities include syndicated diary panel service for a group of textile manufacturers; a national panel of auto owners, Automotive Petroleum and Aftermarket Services; and SIP (Share of Intake Panel) for the beverage industry.

There are about 350 employes, about 90 of whom are fulltime, salaried, located in seven offices.

President of NFO is Jack A. Trumbull, 53, son of the founder, Howard A. Trumbull. He attended the University of Toledo.

No. 15. NPD Research, Floral Park, N.Y. Privately held corporation; founded 1967. Research revenues: $9,700,000, up 16% over '78.

Services offered by this company, which specializes in continuous diary panel research, include the following syndicated services: Package goods diary service, Toy market index, textile and apparel market index, gasoline market index, record/tape market index, wine market index and CREST, which measures the away-from-home institutional food market. In development are two new services: National Eating Trends Report which will measure in-home preparation of food dishes, and a basic mail panel for mail survey research and product testing.

NPD employs about 400 people, of whom over 100 are fulltime marketing and computer specialists, and 200 are fulltime coders.

President-ceo of NPD is Tod Johnson, 35, who has an M.S.I.A. degree from Carnegie-Mellon University. Chairman is Henry Brenner.

No. 16. Data Development Corp., New York. Privately held corporation; founded in 1960. Research revenue: $9,600,000, up 13% over '78.

Included in addition to the parent, Data Development, are revenues from three affiliates: Central Location Testing, Field & Facts and the Telephone Centre. Together, these four organizations employ 120 fulltime salaried employes and from 70 to 90 hourly employes, who are located in three offices.

The company is planning to in-

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crease the capacity of its WATS telephone facility (now at 30 to 40 stations) in 1980 and enter into CRT interviewing.

DDC is jointly run by chairman Jerry Rosenkranz and president Joseph Goldstein. Both are 44 and graduates of the College of the City of New York.

No. 17. Louis Harris & Associates, New York. Wholly owned subsidiary of Gannett Co.; founded in 1956. Research revenues: $9,300,000, up 3% over '78.

About 30% of this survey research company's volume came from studies done outside the U.S., mostly through a London-based subsidiary, Louis Harris International. There are 135 fulltime employes.

LH&A conducts a variety of custom and syndicated surveys in the areas of public opinion, corporate policy and marketing research for business and nonprofit clients. Data collection is via personal interviewing by telephone through the 60-position National Center for Telephone Research facility in New York. During '79, the company opened a new office in Washington.

President and ceo of LH&A is Louis Harris, 59, the well-known pollster. He is a graduate of the University of North Carolina at Chapel Hill. Chief operating officer is Humphrey Taylor.

No. 18. National Analysts, Philadelphia. Subsidiary of Booz, Allen & Hamilton; founded 1943. Research revenues: $8,700,000, up 9% over '78.

This survey research organization, which was acquired by Booz Allen, the management consulting company, 1970, has 170 fulltime employes located in three offices. One especially large project for the U.S. Department of Agriculture accounted for about 25% of '79 revenues (50% in 1978).

NA does both quantitative and qualitative work in the fields of marketing and social science research, a good deal of which is in conjunction with Booz Allen consulting projects. In 1979, NA started Executive Associates, a group of semiretired executives trained to conduct in-depth interviews on technical subjects.

President is Alfred E. Goldman, 54, who has a Ph.D. from Clark University.

No. 19. Opinion Research Corp., Princeton, N.J. Subsidiary of Arthur D. Little Inc.; founded in 1938. Research revenues: $8,200,000, up 7% from '78.

This survey research company, which was acquired by ADL in 1975, has 146 fulltime employes located in four offices. Work is divisionalized as follows: Corporate research, employe relations research, marketing research, marketing profile service, Caravan Surveys (syndicated surveys), government research and political/public policy research.

President of ORC is Herbert Marsch, 55; he is a graduate of the University of Cincinnati.

No. 20. Elrick & Lavidge, Chicago. Wholly owned subsidiary of Equifax Inc.; founded in 1951. Research revenues: $7,100,000, up 5% over '78.

In October '79, Elrick & Lavidge was sold to Equifax, and a research division of that company, Marketing Information Service, Atlanta, was merged into E&L. Revenues of the merged organizations have been annualized for 1979.

In total, this combined survey research organization has 99 fulltime salaried employes located in seven offices. A new addition to E&L's mall operation, the Opinion Center, was opened near Phoenix during 1979. The MIS WATS interviewing capacity in Atlanta was expanded to include 30 positions over those related to a new TELSAM operation.

President and ceo is Robert J. Lavidge, 58, one of the two founders of E&L. He has an

(Continued on Page 96)

DESCRIPTION OF STAR-SPANGLED CLAIM CHECKER: Also known as the Broadcast Rating Council, this is one of the more helpful and beneficial denizens of the ratings jungle. Can be spotted by its wisdom and constant devotion to making sure that rating services "do what they say they do."

HABITS: Assures that ratings services make full disclosure of their procedures and that they meet certain research standards.

Rating services are audited yearly, and those that meet these conditions earn accreditation and are eligible to carry the Council's double check symbol on all reports.

CARE AND FEEDING: Arbitron believes that species such as the Star-Spangled Claim Checker deserve special care and attention. We are constantly listening to the Council's suggestions to make sure our services meet the highest research standards.

The Board of Directors of the Council is composed of representatives of the following industry groups: ABC, CBS, NAB, NBC, NRBA, RAB, the SRA and the TVB.

In addition, observers from the 4A's and the ANA attend board meetings.

For more information on the Star-Spangled Claim Checker and other beasts in the ratings jungle, contact your Arbitron representative. ARBITRON

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80% of Southwest's readers are in professional, technical, managerial or sales-related occupations.

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SOUTHWEST AIRLINES MAGAZINE
11824 Radium
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(Continued from Page 95)

M.B.A. degree from the University of Chicago. John F. Harris of MIS is exec vp.

No. 21. Walker Research, Indianapolis. Privately held corporation, founded in 1964. Research revenues: $7,000,000, up 1% over '78.

This custom survey research company, collecting data mainly through mall facilities and telephone interviewing, has 133 fulltime employes (58 of whom are salaried)and 746 parttimers located in six office sites and three WATS interviewing facilities.

The company is divided into four divisions: Custom research, utility research, data collection, and administrative/financial services.

Frank Walker
Walker Research

W. J. Wilson
Starch INRA

Bernie Levine
Decisions Center

President and ceo is Frank D. Walker, 45, son of Mrs. Tommie Walker Anderson, who founded the predecessor company, Walker Research Service, in 1939. Mr. Walker graduated from DePauw University.

No. 22. Starch INRA Hooper, Mamaroneck, N.Y. Public corporation traded o-t-c, founded in 1923. Research revenue: $5,500,000, up 24% over 1978.

This survey research organization is composed of six divisions: The Starch Ad Readership Service, INRA (International Research Associates), Associates in Diagnostic Research, C. E. Hooper, Daniel Starch (Canada) Ltd. and Media Audience Research. About 16% of revenue was from outside the U.S.

During 1979, the company launched a new syndicated service, National Readership Service, which is designed to measure the primary and total audiences of some 50 publications.

SIH employs 150 fulltime salaried employes.

President and ceo of SIH is William J. (Jay) Wilson, 43, who is a graduate of Yale University.

No. 23. Decisions Center Inc., New York. Privately held corporation; founded 1965. Research revenues: $5,100,000, up 9% over '78.

This custom survey company, which has 83 fulltime employes, is divisionalized as follows: DCI Qualitative, DCI International, DCI Youth Research, and Facts Center, a field and tab operation.

Currently, DCI is adding a WATS line telephone interviewing facility.

Co-ceo's at DCI are Bernie Ruderman, 48, who has an M.S. degree from Pennsylvania State University, and Bernie Levine, 54, who has an M.B.A. from New York University. #

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BPA adds 7 members

Business Publications Audit of Circulation, New York, verifier of all-paid, all-controlled or paid-controlled combination circulation figures, has added seven publications as members. *California Business*, California Business News, Burbank, Cal.; *Microelectronic Manufacturing & Testing*, Lake Publishing, Libertyville, Ill.; *Mobile Times, Two Way Radio Dealer*, Titsch Publishing, Denver; *Oil & Gas Digest*, Hutton Publishing, Houston; *Pacific Goldsmith*, Allen-Pacific Co., San Francisco, and *Today's O.R. Nurse*, Charles B. Slack Inc., Thorofare, N.J. BPA publication members now number 778, up from 728 in March, 1979.

'New Shelter' plans fall expansion to newsstands

New Shelter magazine will increase its circulation rate base to 350,000 from 250,000 this fall. The monthly, aimed at environment and energy-conscious home improvers, is published by Rodale Press, Emmaus, Pa.

It will begin newsstand tests with the September issue, putting 70,000 copies on the stands. Its current circulation is 98% subscription. Cover price is $1.50.

'Science' ups frequency

Science 80, Washington, will increase its frequency from six to 10 times a year in November, its first anniversary. The publication of the American Assn. for the Advancement of Science guarantees 400,000 readers.

Direct Mail forms unit

Direct Mail Corp. of America, St. Louis, has formed Autodata Fulfillment, a new division that will supply literature, merchandise and premium items for U.S. distribution. The unit is at 701 N. 15th St.

DID YOU KNOW?

62.5% of Southwest's readers entertain a client in a restaurant or club an average of 5.3 times per month.

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Advertising pages in May consumer publications

	Pages			
	May 1980	May 1979	Jan.-May 1980	Jan.-May 1979
Women's				
†§Bride's Magazine	212.5	190.5	811.4	684.7
§Cosmopolitan	236.7	254.1	988.4	948.0
Essence	108.0	78.0	382.0	334.0
§Family Circle	114.7	127.7	645.2	688.5
▲Family Health	28.9	24.8	131.0	124.2
§Good Housekeeping	176.7	180.4	787.2	768.3
Ladies' Home Journal	115.0	114.2	514.7	519.9
Lady's Circle	8.9	8.4	44.9	47.9
McCall's	117.6	127.8	502.0	530.1
○McCall's Working Mother	88.9	48.7	205.2	48.7
†Modern Bride	171.3	165.4	674.4	672.3
Ms.	44.7	53.3	232.8	214.8
○New Woman	48.8	50.7	111.6	128.9
§Parents Magazine	74.0	57.2	301.3	249.0
Playgirl	40.7	29.5	231.9	172.3
Redbook	114.3	149.2	539.6	614.4
Self	75.4	47.5	272.1	194.3
Seventeen	127.8	142.0	517.2	528.5
Soap Opera Digest	6.6	16.5	57.6	46.3
*Talk	—	—	77.9	59.7
*Teen Magazine	45.1	40.4	208.0	194.7
§True Story	41.5	61.5	24.8	26.9
§Woman's Day	99.9	127.5	646.1	648.2
The Workbasket	26.4	18.2	151.2	125.2
Working Woman	54.5	32.2	216.3	138.5
Total Group	2,178.9	2,145.7	9,274.8	8,908.3
General				
▲ A.D. Magazine	24.7	18.7	80.5	66.9
After Dark	30.0	30.3	155.5	150.9
Air Progress	26.0	30.2	115.6	120.4
American Forests	14.0	11.1	75.1	75.6
§American Legion	25.8	18.1	143.1	146.1
○Americana	—	—	55.1	71.4
Apartment Life	58.8	52.2	240.2	254.8
§▲Architectural Digest	169.8	116.7	576.7	449.9
§The Atlantic	34.3	32.3	167.8	166.5
○Audubon Magazine	35.6	38.0	100.5	107.3
Blueboy	28.8	21.1	139.6	118.6
§Bon Appetit	82.0	70.1	349.4	280.2
Book Digest	20.5	39.5	154.0	229.3
Christian Herald	41.5	39.8	201.3	219.9
Christian Life	25.2	25.1	133.8	148.2
*Christianity Today	58.4	61.5	300.1	295.5
Complete Men's Group	26.5	24.0	125.8	121.5
Country Journal	44.6	35.8	236.9	212.6
Creative Computing	87.1	68.3	413.8	269.4
▲Cuisine Magazine	40.1	32.2	177.2	133.0
Ebony	97.8	97.6	433.0	432.3
Elks Magazine	21.1	23.5	121.5	135.7
§Esquire	38.8	31.1	199.0	145.0
50 Plus	36.0	39.2	187.9	133.6
Flying	57.5	61.3	280.3	256.5
§Gentlemen's Quarterly	101.3	77.4	421.0	334.7
Golf Digest	79.0	95.4	385.1	438.8
§Golf Magazine	64.9	97.8	429.3	419.7
Gourmet	65.1	58.4	296.0	270.2
§Harper's Magazine	39.0	42.5	175.0	175.0
○Hi-Fi/Stereo Buyer's Guide	23.3	32.2	68.5	80.8
*High Fidelity	54.4	66.0	295.0	338.6
Income Opportunities	47.3	36.9	231.5	223.0
Kiwanis Magazine	16.2	15.1	77.7	78.9
Let's Live	90.3	85.4	476.3	442.7
Life	50.5	47.0	280.3	222.1
Lion Magazine	4.5	18.1	24.5	94.3
Modern Photography	134.1	126.6	515.9	496.5
§Money	91.1	72.8	377.8	335.2
Moneysworth	18.5	25.3	99.1	116.4
Moody Monthly	43.3	47.7	252.5	277.7
○Moose Magazine	—	—	84.0	84.0
○Mother Earth News	61.7	42.6	182.7	129.8
○Museum	14.2	—	38.8	—
National Geographic	35.7	38.3	159.0	163.1
National Jewish Monthly	27.3	27.8	142.1	142.7
Natural History	32.3	37.4	224.5	217.1
Omni	55.6	31.3	247.7	135.4
§Oui Magazine	22.1	17.4	111.2	80.4
§Penthouse Magazine	65.7	85.4	348.7	342.1
Petersen's Photographic	46.8	54.9	217.9	257.7
Playbill	44.7	34.0	218.5	204.8
§Playboy	127.6	131.0	552.2	552.4
Popular Photography	145.4	169.2	708.0	798.7
Prevention	86.1	101.4	434.8	546.0
Prime Time	21.2	—	90.3	—
Psychology Today	75.4	77.3	292.0	285.5
▲Quest '80	28.0	20.9	131.0	98.6
§Reader's Digest	120.5	140.2	487.1	573.4
Rotarian	21.2	21.5	137.6	108.3
††Saturday Evening Post	35.6	47.7	187.5	194.1
Scientific American	90.0	79.3	429.3	363.0
Signature	51.2	55.8	229.7	218.6
Smithsonian	85.6	72.6	400.2	340.4
Stereo Review	59.2	72.7	358.3	375.1
Success Unlimited	46.2	37.0	251.5	193.7
Tennis Magazine	99.3	74.5	316.4	306.3
Town & Country	122.6	105.0	465.4	390.8
Travel/Holiday	53.6	63.6	276.9	268.9
Travel & Leisure	91.3	96.1	452.2	419.9
VFW Magazine	23.9	25.2	153.1	143.4
Weight Watchers	22.1	19.9	98.5	99.2
World Tennis	61.4	49.0	255.8	207.1
Writer's Digest	26.3	20.2	102.6	96.6
Yankee Magazine	85.5	94.5	451.3	494.0
Total Group	3,997.0	3,866.7	18,806.0	17,916.6
Fashion & service				
Glamour	202.3	225.4	791.6	819.2
Harper's Bazaar	69.4	58.0	379.4	324.1
Mademoiselle	152.4	143.0	606.2	584.6
††L'Officiel/USA	—	—	100.3	108.5
Vogue	198.4	183.4	912.2	837.0
▶"W"	62.5	55.1	305.4	273.7
Total Group	685.0	664.9	2,994.8	2,838.6
Arts & antiques				
American Artist	68.8	55.7	271.3	284.0
Antiques	158.8	149.8	773.3	676.3
Antiques World	60.8	54.7	255.3	279.0
○Art & Antiques	55.8	47.5	172.9	136.4
▲Artnews	106.0	108.0	551.0	499.8
Total Group	450.2	415.7	2,023.8	1,875.5
Home				
§Better Homes & Gardens	170.2	150.6	668.5	669.6
○Colonial Homes	57.4	40.9	171.4	113.5
▲Decorating Showcase	20.1	15.2	114.9	55.8
▲Family Handyman	64.8	51.8	313.4	278.7
Flower & Garden	29.4	30.3	165.8	173.5
The Hometown Magazines:				
Dallas-Fort Worth Home/Garden	49.7	32.8	240.1	158.0
Houston Home/Garden	119.5	106.1	526.9	510.1
Horticulture	28.5	29.4	156.3	182.9
House Beautiful	122.4	141.3	492.1	496.1
House & Garden	161.5	144.5	597.2	573.1
†Homeowners How-To	23.9	30.4	79.2	71.3
Hudson Home Magazine	42.5	55.8	227.2	253.1
Indianapolis at Home	69.5	83.0	265.5	343.5
Living:				
○Dallas	123.7	128.5	352.6	364.3
○Houston	105.1	131.5	297.8	359.0
○Denver	88.7	88.6	276.3	251.9
‡Austin	54.2	46.1	100.3	93.4
‡San Antonio	—	—	46.3	37.0
○Phoenix	—	—	80.0	53.6
○Tampa	—	—	64.9	—
▲1001 Decorating Ideas	44.6	33.2	142.6	110.7
Organic Gardening	63.3	70.8	448.9	435.4
○Plants Alive	—	—	54.4	74.1
San Diego Home/Garden	55.3	—	251.0	—
Southern Living	178.2	164.0	663.1	700.2
§Sunset Magazine	183.5	202.4	676.9	732.9
▲Texas Homes	69.0	84.0	292.0	225.0
○Workbench	59.3	54.8	190.0	182.4
Total Group	1,984.3	1,926.0	7,975.6	7,499.1
In-flight				
#Aboard Group	—	—	768.0	716.0
Air California	64.3	54.3	287.3	286.5
American Way	79.9	66.8	336.9	279.6
Halsey Publications:				
Braniff's Flying Colors	44.8	30.5	181.7	155.0
Delta Sky	44.7	41.5	221.5	230.5
Clipper	58.2	—	197.5	—
East/West Network:				
Eastern Review	85.0	66.5	406.5	412.4
Hughes Airwest Sundancer	74.4	84.3	383.5	402.2
Continental Extra	76.8	71.8	351.0	337.9
Ozark Flightime	53.7	57.2	284.8	299.7
PSA Magazine	115.3	118.6	553.6	563.4
Texas International/The Texas Flyer	61.0	57.2	302.7	267.2
United Mainliner	107.9	114.4	487.6	495.5
○Pace	22.0	15.8	59.5	53.0
Scene	35.0	—	137.4	—
Southwest Airlines	76.0	57.0	317.1	241.7
○Spirit of Aloha	25.7	18.6	80.2	50.8
USAir	46.3	—	179.3	—
Webb Publications:				
○Frontier Magazine	48.9	35.5	126.4	114.5
Passages	28.2	20.1	133.2	132.2
TWA Ambassador	66.3	46.2	259.2	225.4
Total Group	1,214.4	956.3	6,054.9	5,263.5
Metropolitan				
○Aloha	24.0	8.0	64.5	21.0
Atlanta	83.5	88.5	379.9	361.5
Baltimore	79.3	93.4	370.4	393.1
○Bay Views	41.5	32.0	170.2	162.3
Birmingham	31.2	30.8	114.8	143.3
Boston	126.7	106.9	518.3	444.7
Broward Life	45.4	45.3	260.3	256.2
Brown's Guide to Georgia	57.0	44.0	208.4	206.0
Central Florida Scene	16.2	18.9	75.5	73.2
○Charlotte	65.4	53.7	112.3	98.6
Chicago	155.2	180.1	719.3	744.2
▲Chicago's North Shore	66.0	47.3	209.9	123.4
Cincinnati	66.5	56.2	313.5	268.2
Cleveland	84.7	107.1	374.3	425.7
Columbus Monthly	88.5	84.1	395.8	381.0
Commonwealth	15.0	16.0	74.0	91.0
Connecticut	63.2	78.3	321.4	364.9
D/Magazine, Dallas/-Fort Worth	116.3	118.2	514.0	483.7
Delaware Today	39.3	37.7	186.2	167.0
Denver Monthly	20.3	27.0	120.6	115.8
Monthly Detroit	68.0	46.0	225.0	189.2
Exclusively Yours Wisconsin	61.3	72.3	361.2	400.6
Gold Coast of Florida/-Indian River Life	105.4	103.5	637.9	594.5
Grand Rapids	36.6	21.3	163.3	114.0
Honolulu	72.0	77.3	353.3	354.9
Houston City	41.2	47.6	174.4	176.2
Indianapolis	68.5	40.0	214.2	149.8
Kansas City	35.6	46.5	148.8	172.8
Lansing	35.0	27.0	162.6	89.0
Los Angeles	213.0	223.0	930.8	967.5
Madison	43.5	31.8	179.5	122.3
Mesa	30.5	—	300.9	234.2
Miami	56.4	45.2	283.4	243.1
Mpls./St. Paul	72.9	40.0	344.3	231.9
Monterey Life	40.6	—	195.6	—
Nashville!	54.6	66.5	269.7	271.4
New Jersey Monthly	100.3	63.1	369.7	304.4
New Mexico	30.7	16.3	111.6	79.4
New Orleans	45.2	53.4	226.1	250.3
Ohio	19.6	29.7	121.1	191.0
Omaha	31.0	25.7	130.6	106.7
Oregon	20.4	23.6	90.2	111.4
Palm Beach Life	42.0	40.7	391.7	270.6
Palm Springs Life	97.5	92.3	733.0	653.0
Philadelphia	151.9	157.2	644.2	684.1
Phoenix	102.9	94.9	545.4	446.7
Pittsburgh	48.0	60.5	223.9	260.5
Pittsburgher	38.0	32.0	198.5	142.5
○Roanoker	37.0	47.0	125.8	144.0
SA, The Magazine of San Antonio	31.2	30.5	177.4	119.4
Sacramento	27.2	33.5	118.3	177.3
St. Louis	96.5	104.0	424.0	474.0
San Diego	147.1	167.5	725.5	749.9
San Francisco	77.7	63.7	301.0	256.9
San Francisco Focus	42.0	18.0	161.1	107.2
††Sarasota Town & Country	29.0	37.0	193.0	129.0
▼Shenandoah Valley	—	—	75.0	—
Spokane	38.8	39.0	167.9	176.7
Tampa Bay Life	57.8	42.4	297.3	213.4
Texas Monthly	153.9	132.5	555.4	516.2
○Triad	—	—	35.0	61.0
Tucson	25.0	42.0	173.0	226.3
Twin Cities	51.5	23.1	148.0	87.9
Washington Dossier	42.0	43.0	222.0	212.0
The Washingtonian	133.0	135.0	570.0	601.0
Westchester	38.5	57.7	199.2	211.3
Westchester Illustrated	42.0	38.5	216.2	179.8
Wichitan	50.0	56.5	220.2	259.9
Total Group	4,168.0	3,961.8	19,340.0	18,040.0
Movie-romance-radio-tv				
○Complete Women's Group	—	—	49.0	55.7
Ideal Women's Group:				
Daytime Stars	29.7	28.5	116.3	117.6
Intimate Story	28.8	29.7	140.3	149.5
Personal Romances	28.8	29.8	140.4	163.2
○Soap Opera	—	—	51.2	29.8
KMR Women's Group:				
Real Romances	11.7	15.3	57.5	72.9
Real Story	11.7	15.3	57.5	72.9
○Teen Bag	7.2	12.0	26.7	41.9
Macfadden's Women's Group:				
Modern Romances	25.9	41.4	145.9	176.8
Secrets	25.9	41.4	145.9	175.2
True Confessions	25.9	40.1	148.5	174.9
True Experience	25.9	40.4	145.9	174.8
True Love	25.9	41.4	145.9	175.8
True Romance	25.9	40.4	145.9	174.8
Sterling Women's Group:				
Daytime TV	31.3	33.2	156.3	160.7
Modern Love	—	30.2	61.2	153.8
Modern Screen	31.6	33.2	160.1	160.7
○Movie Mirror	31.6	33.2	95.2	96.7
Photo Screen	—	—	32.3	64.0
Real Confessions	30.3	30.2	123.7	153.8
TV Movie Screen	31.6	33.2	95.2	97.8
TV Picture Life	—	—	64.9	64.0
Total Group	429.7	568.9	2,305.8	2,707.3
Youth				
Boys' Life	21.2	24.4	109.9	114.0
Campus Life	23.3	29.4	176.3	172.6
††Scholastic Magazines	—	—	—	—
Total Group	44.5	53.8	286.2	286.6
Mechanics & science				
○Elementary Electronics	25.6	34.7	74.1	104.9
§Mechanix Illustrated	98.5	105.7	437.7	478.1
Popular Electronics	59.6	53.5	299.9	282.6
Popular Mechanics	157.0	151.2	624.5	640.1
§Popular Science	107.8	94.8	480.7	484.0
Total Group	448.5	439.9	1,916.9	1,989.7
Boating & yachting				
Boating	126.5	123.2	650.8	645.0
Chesapeake Bay	34.5	27.9	158.1	143.2
Cruising World	113.4	109.6	569.5	513.5
Motorboat	58.3	78.0	295.3	417.4
Motor Boating & Sailing	131.2	134.1	713.9	727.1
§Sail	142.8	148.0	720.6	752.1
§Sea	95.4	96.3	530.3	503.0
Trailer Boats	33.0	27.9	160.9	152.3
Yachting	185.1	196.8	942.2	1,039.4
Total Group	920.2	941.8	4,741.6	4,893.0
Automotive & recreational vehicles				
Car & Driver	117.1	113.2	395.4	371.0
Car Collector & Car Classics	22.5	23.3	115.9	119.2
Car Craft	66.4	96.0	251.6	327.5
Choppers	16.0	12.0	82.0	72.3
Custom Bike	—	31.1	41.1	119.5

§Sectional linage included but prorated to circulation of regional editions. *Sectional linage included but NOT prorated to circulation of regional editions. †Published 6 times a year. ○Published every other month. ▲Published 10 times a year. ††Published 9 times a year. ‡Published 3 times a year. #Published quarterly. ☆Published twice a month. ‡‡Published 7 times a year. ◇Published 11 times a year. ▼Published 8 times a year. **Published weekly. ▶Published every two weeks. A. Figures reflect larger page size. B. Preprinted inserts included. C. May figures not available.

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